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New Skills for the Academic Library Workforce: The Canadian Experience

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The nature of library work has changed dramatically since ancient times when librarians were first revered as “keepers of the book”.¹ Today’s academic library workers are expected, not just to collect and provide access to published text, but to help manage and structure information. They are increasingly expected to support new technology-infused methods for scholarly research, to explore new models for academic publishing and to speak with authority about intellectual property, human-computer interaction, bibliometrics and data visualization. They are called upon to be excellent teachers, strong communicators and exemplary leaders on campus.

The following paper will document the progress made by the Canadian Association of Research Libraries (CARL) over the last 15 years to help the nation’s academic library workforce meet the new expectations. The paper will begin with some high level observations of what could arguably be described as the CARL approach to workforce development over the time period. The remainder of the paper will document important national milestones and accomplishments including the 8Rs Study (2005 and 2015), the Core Competencies (2010), the Librarians’

¹ Richards, Pamela Spence et al. *A History of Modern Librarianship : Constructing the Heritage of Western Cultures*, by F William Summers Professor Emeritus School of Library and Information Studies Wayne A Wiegand, and Marija Dalbello. Pearson Education, 2015, xv.

Research Institute and the Canadian Library Assessment Workshop.

Most of the accomplishments documented in this paper have been led by CARL, the membership organization representing 29 of the largest research libraries in Canada. Inspired leadership came from CARL's Library Education Working Group (2006-9) and its successor groups (the Building Capacity Subcommittee and, most recently, the Strengthening Capacity Committee).² Other initiatives described in this paper have been advanced (in partnership with CARL) by teams of librarians with a shared commitment to furthering the continuing professional development of staff - at their home institutions and across the country.

A View From the Balcony: Key Attributes of the CARL Approach to Continuing Professional Development

Canadian research libraries have been actively engaged in workforce analysis and development since the early 2000's. A review of key accomplishments over the period suggests some possible patterns. The authors propose the following attributes as arguably descriptive of a "CARL approach" to workforce capacity development:

1. National Approach: CARL has consistently taken a long-range and national approach to building workforce capacity. Leaders recognize the importance of focusing the Association's energies on areas where collective action

² CARL takes workforce development as a key aspect of its mission. As noted in the Association's Strategic Plan, CARL aspires to "foster development of expertise and capacity for new and emerging roles" by supporting "strategic recruitment, leadership and management development and diversity." CARL Strategic Directions, May 2016 - May 2019. <http://www.carl-abrc.ca/about-carl/strategic-directions/>

truly adds value. Some kinds of general training (for example, project management training) are easily found locally - on individual members' campuses. Other very specialized kinds of training might be best supported at the provincial or national level.

2. Competencies Based: CARL has placed significant attention on identifying and describing the core competencies required to be successful in the Canadian research library context. The concept of codifying expertise is proposed as an aspirational (rather than a prescriptive) exercise - with the expectation that individual librarians will place varying emphasis on specific components depending on the positions that they hold and the specific environment within which they work.³

3. Shared Responsibility: Those active in CARL workforce initiatives have historically viewed continuing professional development as a shared responsibility. Library workers hold significant personal responsibility for their own development. But they share that responsibility with their employers, with the library schools which provide their original training and with their national and provincial associations for ongoing post-degree development. (Note that this concept aligns very well with the IFLA Continuing Professional Development Guidelines.⁴)

4. Community Building: Over the period, CARL has focused on delivering ongoing learning experiences rather than "one-shot" workshops. CARL recognizes the importance of creating communities of practice which participants can engage in

³ CARL. Core Competencies for 21st Century CARL Librarians. 2010, p. 3.

⁴ Varlejs, Jana. IFLA Guidelines for Continuing Professional Development: Principles and Best Practices. May 2016. <https://www.ifla.org/files/assets/cpdwl/guidelines/ifla-guidelines-for-continuing-professional-development.pdf>

throughout their careers. The true benefits of an educational experience are often more linked to the relationships made than the specific knowledge gained.

5. Peer-to-Peer: CARL has learned that the most effective training and development opportunities are often led by experts drawn from the community itself. These individuals have credibility with their colleagues and a clear understanding of the environments within which these colleagues work.

6. Avoid Reinventing the Wheel: The CARL approach puts heavy focus on the avoidance of duplication. If another group is already doing good work in a particular area, the Association is not going to waste limited resources recreating it. Instead, CARL leaders will partner with that other group to leverage strengths and share costs.

Putting the Workforce Under the Microscope: The 8Rs Study (2005)

The Canadian library community's interest in its workforce took on a new sense of urgency in the early 2000s after a ground-breaking study referred to as the "8Rs" was conducted. (The name 8Rs referenced the eight core issues typically associated with human resource management in the literature (retirements, recruitment, retention, etc.) The massive national study emerged out of a well-documented concern that a large proportion of the Canadian library workforce was expected to retire within a five-to-ten year time frame⁵. The work, which spanned academic, public and special libraries, was conducted by a team of expert

⁵ The reasoning at the time made good sense. Years of budget cuts in the early 1990's across Canada had dramatically reduced hiring.

researchers at the University of Alberta, led by Ernie Ingles. The team explored over 600 variables using data from 461 library administrators, 2,200 librarians and 2,000 para professionals. The research culminated in a major 275 page report titled *The Future of Human Resources in Canadian Libraries* (2005)⁶

The 8Rs study documented changes that previously were suspected, but never proven. The data showed that, in most library organizations, staff were being asked to perform more specialized skills than they had even five years earlier. In particular, they were being asked to take on more significant leadership activities and information technology roles.

While the original impetus of the study was to prepare for an anticipated and unprecedented wave of retirements, new issues emerged as the research was done. As the data poured in, the researchers drew increasing attention to the need to retrain existing mid-level staff to move into more senior positions - rather than focus too narrowly on recruitment. The study identified some very significant training gaps: For example, many new librarians (almost half) believed that they had not been given sufficient training to be successful in their roles. In particular, they wanted more IT training and more leadership training.

The impact of the 8Rs study was felt across the community. For the first time, directors, human resources managers and individual library workers had access to vast quantities of human resources data about the profession. As a result, the community became much more attentive to the shape and needs of the workforce. Training new and existing staff took on tremendous importance. In doing

⁶ Ingles, E., De Long, K, Humphrey, C., Sivak, A. *The Future of Human Resources in Canadian Libraries*. 2005. ,<http://www.ls.ualberta.ca/8rs/8RsFutureofHRLibraries.pdf>

so, the 8Rs study laid the groundwork for much of what came afterwards.

The CARL Response: Report of the Library Education Working Group

CARL's response to the 8Rs study was swift and deliberate. In 2006, a delegation of CARL directors met with deans and directors of several Canadian library schools to discuss areas of possible collaboration. In November of the following year, the CARL Board established the Library Education Working Group under the able leadership of Dr. Vicki Williamson (University of Saskatchewan). The group was charged to "create relationships with those interested in library education and research, to identify next steps for taking identified priorities forward, to identify actions arising from the recommendations of the 8Rs Report and to make recommendations to the CARL Board."⁷ The group's final report (released in 2008), called for the establishment of a National Research Agenda to identify key research priorities as well as a training program for library research skills. The report also called for an Education Agenda with a focus on a "formalization of relations" between CARL and the library schools, the establishment of Scholars-in-Residence programs and the crafting of a competency statement for academic librarians. The report also urged the Association to formulate a strong position statement on the topic of continued professional development.

Core Competencies (2010)

In 2009, a small team was tasked with producing one of the key components

⁷ CARL Library Education Working Group: Final Report to the CARL Board of Directors, Spring 2008, p. 2.

of the Library Education Working Group's recommendations - a formal statement of the competencies required for success in the contemporary Canadian academic library workforce. The proposed document had many objectives. The Core Competencies would help individual librarians manage their own careers. It could be used as a checklist against which to benchmark their own development. What were their strengths? What development goals should they set for themselves to further their careers? For library directors and HR managers, the document would assist with drafting job postings and shaping new staff training opportunities. Finally, the statement would help CARL libraries as a collective "market the library profession and recruit new talent."⁸

The culminating document, released in 2010 as the *Core Competencies for 21st Century CARL Librarians*, identified seven key areas of expertise:

1. Foundational Knowledge
2. Interpersonal Skills
3. Leadership and Management
4. Collections Development
5. Information Literacy
6. Research and Contributions to the Profession
7. Information Technology Skills

Three of these competency areas received particular interest when the document was first released:

Management and Leadership: The Competencies document stated clearly that management and leadership skills are required of all librarians - not just those

⁸ CARL. Core Competencies. P. 3.

in administrative positions. All librarians need the ability to “influence, motivate and challenge their colleagues and their community to advance library and institutional goals and objectives.”⁹ All librarians need some foundational understanding of project management and strategic planning. All librarians need to have basic familiarity with budgeting and human resources.

Core **research competencies** emerged as a significant need. Librarians in many, if not most, Canadian research libraries are expected to be “researchers in their own right.”¹⁰ They are required to engage in some amount of professional service and scholarly activity as part of their overall work lives. Many are evaluated on the basis of the number and quality of articles, book chapters, conference presentations and studies they write. With that context in mind, the authors deemed it reasonable to expect CARL librarians to embrace an evidence-based approach to their work and to possess a strong foundational understanding of research methods and approaches.

Finally, **technology skills** appeared very prominently in the competency statement. Canadian research librarians are expected to be “technologically savvy.” They may not all be able to program or to install a server - but they are expected to be active in the digital world, to be knowledgeable about the basics of digitization, social media, etc. They are expected to have some foundational knowledge of digitization, information repositories and bibliometrics. They should be able to speak with some authority about research data management and preservation to any faculty member who asks.

⁹ CARL. Core Competencies, p. 4

¹⁰ CARL. Core Competencies, p. 5.

Filling the Gaps:

So far, this paper has described CARL's efforts to identify and describe the critical needs of the Canadian academic library workforce. The remainder of the paper will present some key initiatives either led or supported by CARL to help meet these needs. As noted earlier, the Association has focused its attention on specific areas where demand feels greatest and where the Association sees a clear value to collective national action. The approach has been, whenever possible, strategic, focused on community building and supportive of a peer-to-peer approach.

Research Skills: The Librarians' Research Institute

Canadian academic librarians' strong interest in enhancing their research skills has been a constant theme throughout the 2000's. CARL's Building Capacity Subgroup (successor to the Library Education Working Group) took that interest to heart and, with strong leadership from a core set of librarians at the University of Windsor, launched the first Librarians' Research Institute (LRI) in 2012.¹¹ The LRI, which has been running every year (with a one-year hiatus) since 2012, aims to help CARL librarians advance their personal research skills in a supportive community-based environment. The Institute is an intense, one-week experience bringing together approximately 30 practicing librarians from around the country to immerse themselves in the research process. The event moves from place to place across the country to facilitate the development of a broad, national network of

¹¹ The LRI owes a tremendous debt of gratitude to colleagues at the University of Windsor (former University Librarian Gwen Ebbett and librarians Heidi Jacobs and Selinda Berg) for helping shape the curriculum and overall plan for the first Institutes.

librarian researchers.

The Librarians Research Institute uses a peer-model approach to build a true community of practice around research. Each Institute is led by a program director and four to six peer mentors drawn from around the country. The peers are present as mentors and co-learners rather than as sage experts.¹² In a 2014 interview, an early leader noted that: the tagline “By Librarians, For Librarians” describes what we set out to create: a place where librarians could help, support, mentor, and encourage each other.”¹³

The curriculum for the Librarian’s Research Institute is very active - with a good mix of plenary sessions, panel discussions, small group work, individual writing and self reflection. The participants walk away with, not just an enhanced tool kit of skills, but also a strong network of peers to work with throughout their careers.

Assessment Skills: the Canadian Library Assessment Workshop (CLAW)

Canadian academic librarians have also expressed tremendous interest in enhancing their assessment competencies. Over the last decade, many libraries have established formal assessment programs for the first time. In some cases, librarians have been appointed into assessment positions without a great deal of formal training. Many new recruits attend conferences and workshops in the United States and Europe, but need avenues to explore Canadian assessment initiatives

¹² Jacobs, H. and Berg, S. “By Librarians, For Librarians: Building a Strength-Based Institute to Develop Librarians’ Research Culture in Canadian Academic Libraries” *The Journal of Academic Librarianship* 39 (2013), 227-231

¹³ Bufton, Martha Attridge, “A Place for Mentorship & Support: the CARL Librarians’ Research Institute,” *Inside OCULA*, 23 Sept. 2014. <http://www.open-shelf.ca/carl-lri/>

and to meet and network as a group.

The Canadian Library Assessment Workshop (referred to affectionately as “The CLAW”) has been running to fill that gap since 2013. The workshop brings together approximately 50 interested librarians involved in assessment and statistics to learn from each other.

The evolution of the CLAW curriculum shows tremendous development. The first CLAW featured an overview of statistics reporting and a popular session titled “Assessment 101” to help introduce core skills and approaches to the many new assessment librarians being appointed across the country. By 2015, the CLAW was focusing on two big issues (linking data to strategic plans AND unbundling the big deal) as well as hands-on training in using Tableau. In the 2017 run, the focus was increasingly specialized with sessions such as creating metrics for institutional repositories. Although the focus evolves from CLAW to CLAW, the approach remains “tangible and practical.”¹⁴

As with the LRI, the CLAW was designed by and for the assessment librarians themselves rather than imposed upon them by others. The program committee and workshop leaders are drawn from the assessment community. The small group atmosphere ensures that participants leave, not just with new knowledge, but also with new colleagues and potential partners. The decision to move the workshop around the country has helped build the sense of a truly national workforce development program.

¹⁴ CARL. 2017 Canadian Library Assessment Workshop. <http://www.carl-abrc.ca/mini-site-page/2017-canadian-library-assessment-workshop/>

Future Work

The rapid transformation of the the library profession continues unabated - and with it comes the constant need for new, more advanced staff training and development opportunities. CARL has much work yet to do. (CARL funded a second iteration of the 8Rs study, just for the research library sector, in 2015. The final report from the 8Rs REDUX suggested that, although library leaders think that they are providing an increased number of training opportunities for their staff, their staff still feel that their options are too limited.)¹⁵

Where is CARL going next?

The Association's Strengthening Capacity Committee is now in the process of rewriting the 2010 Competency document to reflect the new realities of the profession. The team continues to explore the models: Should the framework of the competency statement be occupation-based or more integrative? How much change is required in the areas of technology and scholarly publishing to reflect the new realities? How best do we engage front line librarians in the discussion?

The Association is also looking at options for more management / leadership training. To date, CARL libraries have relied on a host of external leadership programs including the Northern Exposure to Leadership Institute (NELI), the Association of Research Libraries ARL Leadership Fellows Program and the Library Management Skills Institutes (LMSI) to supplement the local management/leadership opportunities available on individual campuses. CARL

¹⁵ DeLong, K, Sorensen, M. and Williamson, V. 8Rs REDUX: CARL LIBRARIES' HUMAN RESOURCES STUDY, Summary of Major Findings and Strategic Human Resources Planning Implications. March 2015. Available at: <http://www.carl-abrc.ca/doc/8Rs%20REDUX%20Executive%20Summary.pdf>

continues to search for inventive ways to support leadership training on a national scale - without replicating the excellent work being done by other organizations.

The demand for different kinds of workforce training is constantly changing. Currently, Canadian library directors and workers have expressed strong interest in research data management training opportunities. CARL continues to work with colleagues in the Portage (the shared network for stewarding research data in Canada) to support this specialized training. Workforce diversity is also becoming an issue of increasing importance across the country. What training and development programs are required to ensure that new recruits from underrepresented groups are successful in the Canadian academic library workforce? Could partnerships be struck with Canadian library schools to help ensure more recruits from diverse backgrounds find positions within our ranks? Could CARL provide learning opportunities to help Canadian academic libraries better prepare themselves to meet the needs of an increasingly diverse user population?

Conclusion

CARL has invested significant energy over the last 15 years in building workforce capacity across Canadian academic libraries. The Association has consistently focused its attention on areas where demand felt greatest and where collective, national action made sense. The “CARL approach” has been strategic, focused on community building and reflective of a peer-to-peer model.

The 8Rs Study (2005) laid the foundation for much of what followed. The

Education Agenda proposed by the CARL Library Education Working Group established a road map that remains valid even today. That document anticipated the Core Competencies statement, laid the groundwork for the Librarians Research Institute and, perhaps most importantly, focused the membership's attention on the critical importance of continuing professional development.

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